HOW TO INSTALL

(These instructions are also located in part II of the User's Guide)

Main Tool Files

The main tool files are provided on CD for easy download to the root of the C: drive of your computer. These files are organized into a predetermined directory structure and when downloading them from CD, it is important to remember these two rules to ensure the tool's links and formatting will work properly:

1. The tool uses several hyperlinks and programmed formulas to facilitate navigation. These references all rely on the C: drive root directory as the location of the files. The files must be stored in this directory to function properly unless the links and formulas in each file are reprogrammed to reference a different location.

2. The default directory structure exists to facilitate the tool's built-in formatting. Again, for the automated functionality of the tool to work properly, this default structure must be retained.

Depending on the processing speed of your system, installation takes 5-15 minutes and requires only a CD-ROM drive and access to the Windows Explorer file management application on your computer:

1. Insert the CD into your computer's CD-ROM drive (your system may initiate Windows Explorer automatically and display the files on the CD by default).

2. If Windows Explorer does not initiate automatically, find it on your "Start" menu and double-click the listing for the CD-ROM drive.

3. The root directory folder for the main tool files is named "CFP Tools and Templates." Click once on this directory listing, select "Edit" from the main menu at the top of the screen, then select "Copy" on the drop-down menu.

4. Double-click on the C: drive (under "My Computer" if you have trouble locating it) and double-check to make sure you are at the root before going to Step 5.

5. Select "Edit" on the main menu, then select "Paste" on the drop-down menu to initiate the download.

6. You will see a dialog box appear indicating files are being transferred and the expected download time. If possible, please allow this process to complete entirely before closing this dialog box or the Windows Explorer application. Should it be necessary to interrupt this process, you may need to start again with Step 1 above to successfully complete the download.

Macros

For the spreadsheets to share and calculate data properly, you will also need to pre-load the macros (or mini applications), programmed especially for the tool:

1. After the main tool files have loaded, return to the listing for the CD-ROM drive in Window's Explorer.

2. The file containing the macros is named "Personal."

3. Click once on the file name, select "Edit" from the main menu at the top of the screen, then select "Copy" on the drop-down menu.

4. Double-click on the C: drive and check to make sure you are at the root.

5. From here, open the "Documents and Settings" directory, open your user name directory, then open application data.

   (If application data is not showing, you will need to unhide it by going to: "Start", "Settings", "Control Panel", "Folder Options", "View", and click the radio button for "show hidden files and folders.")

6. Under "Application data", select "Microsoft", then "Excel", then "XLSTART."

7. Select "Edit" on the main menu, then select "Paste" on the drop-down menu to initiate the download.

Template and File Integration

Many of the spreadsheets and corresponding text files in the tool are pre-programmed to share data. Occasionally, you will find an area that does not pre-fill with information you have already entered somewhere else. Although it may be tempting to copy/paste the data from one file into another, it is not always best as it may also copy formulas designed to work in the original file only. As a general rule, if you need to duplicate information you have already entered, it is best to either re-enter it manually, or if it is absolutely necessary, copy and paste the selection into notepad to remove the formatting, then re-copy and paste it into the new file.

Setting up Macros and Special Tools

To set up Excel to display the special toolbar used for initiating the tool's built-in macros:

1. Open Excel (a blank spreadsheet file labeled "Personal" should display in your work area). Keep this file open while performing the following tasks.

2. Click "Tools" on the main menu and select "Macros" from the drop-down list.

3. A dialogue box will appear listing eight macros.

4. Click once on the "Toolbar" listing.

5. Click the "Run" button and your computer will create a preliminary toolbar displaying yellow smiley-face icons on your work area. This new toolbar is labeled "CFP1."

6. If your computer also launches Visual Basic and associated work screens, close the work screens/program windows and return to the first Excel screen.

To assign Macros and Hyperlinks to the buttons on the preliminary toolbar:

1. Click "View" on the main menu, hover over "Toolbars" on the drop-down list and select "Customize" from the toolbar listing. This will launch a dialogue box that allows modification to the buttons on the custom toolbar.

2. Right-click on the first button on the toolbar and select "Assign Macro." The dialogue box listing the macro names will appear. Select "Blanks" from the list.

3. Right-click again on the first button on the toolbar, select "Name" and change the name of the button to "Blanks."

4. With the drop down list still up, select "Change Button Image" and select an image of your choice from the pop-out box.

5. Follow the same steps for the second button assigning the "Column Sort" macro.

6. Follow the same steps for the third button assigning the "Data" macro.

7. Follow the same steps for the fourth button assigning the "Hours" macro.

8. On the fifth button, you will assign a hyperlink instead of a macro. Hover over "Assign hyperlink" and select "Open" from the pop-out list.

9. Browse to the C: drive and select the "CFP Tools and Templates" folder, select the "5 Project Costs and CFP Text" folder, select the "Project Cost Related Files" folder, select the "Cost Matrices" folder, and finally select the "Permit Matrix" file. Name it "Permit Matrix."

10. Follow the steps for the sixth button to assign the "ProjSize" macro.

11. Follow the steps for the seventh button to assign the "Totals" macro.

12. On the eighth button, you will assign a hyperlink to the "Table of Files" file, located under the "CFP Tools and Templates" folder, then under the "CFP Process and Initial Files" folder.

13. The ninth and final button is also assigned a hyperlink to the "Task List" document, which is in the same folder as the "Table of Files" document.

14. Double-click on the "Table of Files" file name.

15. Finish by naming the button "Table of Files" and changing the button image.

This tool bar should display each time you open Excel. If it does not, it can easily be opened by right clicking on any toolbar and selecting “CFP1” from the drop-down list.

By default, the toolbar will hover over your work area. If you would prefer to have it integrated into the rows at the top of the screen holding other toolbars, you may click and drag it to the same area and it will attach to the row your mouse is over when you unclick the mouse button. Alternatively, to detach it again, click on the stacked grey bars to the left of the tool buttons and drag it back onto the screen.

You may also need to adjust your Excel security level to allow the macros to launch:

1. Click “Tools” from the main menu.
2. Hover your mouse over “Macro” on the drop-down menu.
3. Select “Security” from the side pop-out menu.
4. Select the “Medium” radio button in the dialog box.

Data Analysis Tool

The final tool you will need to pre-load into Excel to facilitate the template data formatting is the “Data Analysis Tool”:

1. Click “Tools” from the main menu and select “Add-ins” from the drop-down menu.
2. Check the “Analysis toolpak” option.